



Project Page Redesign

Get more done in less time

We heard your feedback about the continuous scrolling and added white space on the Project page. So, we redesigned it to help you work more efficiently and better manage your projects. The Project Page redesign is automatically enabled for you with ST-58. There are no new permissions and no changes to the functionality available to you, so everyone can keep working as they did before, only much more efficiently now.

WHAT'S NEW

- ★ Inline editing of Custom Fields & Project Status
- ★ Navigation Menu to quickly jump to specific sections
- ★ Actions consolidated into one 'Actions' dropdown
- ★ New Action Buttons found throughout page in their respective section

Click on the numbers to learn more about each section.

ServiceTitan | Dashboard | Calls | Schedule | Dispatch | Accounting | Inventory | Follow Up | Reports | Marketing | Pricebook

PROJECT
Capital Improvement Project
#9472835 | In Progress | [Hide additional info](#)

SERVICE LOCATION
California Science Center
700 Exposition Park Drive Los Angeles, CA 900...

BILL TO
Mark Weeks
801 North Brand Boulevard #700 Glendale, CA ...
8056896015 | [View all contacts](#)

CONSTRUCTION

1 Actions

2 Dashboard
Project Overview

3 Financials
Project costing, invoices, payments

4 Jobs & Appointments
Book or View Jobs

5 Estimates
Sold & Unsold Estimates

6 Purchasing
Purchase Orders & Requisitions

7 Technicians
Team's Timesheets

8 Audit Trail
Notes, Events & Media

Permit Number
1902882

Pre-Site Complete
Yes

PROJECT MANAGER
Keegan

START DATE
05/04/2021

TARGET COMPLETION
28/01/2022

ACTUAL COMPLETION
//_

CONTRACT FOR
CapEx Improvements

CONTRACT DATE
05/04/2021

PROJECT DESCRIPTION
Planned improvements per approved capital expenditure plan

Navigation Menu

The new Navigation Menu makes it easy for you to access the exact information you need in one click. No more endless scrolling up and down the page. You can quickly click to review Job & Appointment History, check Project Purchase Order status, audit timesheets, and more!

Dashboard

Project Overview

Financials

Project costing, invoices, payments

Jobs & Appointments

Book or View Jobs

Estimates

Sold & Unsold Estimates

Purchasing

Purchase Orders & Requisitions


Technicians

Team's Timesheets

Audit Trail

Notes, Events & Media

Header



PROJECT

Capital Improvement Project

#9472835

In Progress

PREVAILING WAGES

Hide additional info

SERVICE LOCATION

California Science Center

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Actions

Dashboard

Project Overview

Financials

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Permit Number

1902882

Pre-Site Complete

Yes

The Header is always visible at the top of the page.

- Any Custom Fields you've configured to display on the project page will now be listed here (Permit Number & Pre-Site Complete in the example above). If you want to hide these, click **Hide Additional Info**.
- Inline editing lets you quickly change the project status, update custom fields, or change the image. Click the **Pencil Icon** next to the **Actions** button for all additional edits.
- We've consolidated all of the same actions available to you in a new Actions dropdown. This saves you time from having to scroll to the top of the page if you need to book a new job..

0 Glendale, CA ...

Actions

Invoice

Book New Job

Attach Existing Job

Create Payment

Add Invoice

Add Application for Payment

Build Estimate

Add Purchase Order

Add Requisition

Please note, the **Add Application for Payment**, **Build Estimate**, **Add Invoice**, and **Create Payment** action buttons are only visible to customers with Project Tracking enabled. The **Add Purchase Order** and **Add Requisition** action buttons are only visible to customers with Project Requisition functionality enabled. For more information on Project Tracking or Project Requisition functionality, please reach out to your CSM.

Dashboard

The Dashboard displays relevant project information such as the Project Manager, contractual information, and the description. Need to update key project dates? Click the pencil icon in the header.

PROJECT MANAGER
Keegan

START DATE
05/04/2021

TARGET COMPLETION
01/28/2022

ACTUAL COMPLETION

CONTRACT FOR
CapEx Improvements

CONTRACT DATE
05/04/2021

PROJECT DESCRIPTION
Planned improvements per approved capital expenditure plan

Financials

The Financials section displays all information related to the project financials, including Project Summary*, Budget vs Actual*, Expense Details*, Invoices, Created Payments, and Application for Payments*. In addition, Jobs & Appointments have been moved to their own section for better organization.

BEFORE

Project Summary [Learn More](#)

	Amount	Percent Complete
Contract Sum	\$123,230.00	22.0%
Expenses	\$13,197.87	23%
Cost to Complete	\$12,382.13	100%
Total Earned	\$27,500.00	22%
Total Retainage	\$2,750.00	2%
Invoiced	\$24,750.00	20.1%
Payments	\$15,120.00	
Totals		-1.9%
AR Balance	\$9,630.00	
Balance to Finish (including Retainage)	\$98,470.00	

Budget vs Actual

Expense Details

Jobs [View Calendar](#)

Job #	Type	First Appointment	Last Appointment	# of Appointments	Technicians	CR
9545891	New Construction	12/06/2021	12/06/2021	1		NV
9545897	New Construction	12/02/2021	12/02/2021	1		NV

Appointments [View Calendar](#)

Job #	Appointment #	Job Type	Start Date & Time	Technicians
9545891	9545891-1	New Construction	12/06/2021 07:00 am	
9545897	9545897-1	New Construction	12/02/2021 07:00 am	

Application for Payments

Application #	Period to Date	Payment Due	Invoice #	Payment	Balance
2	05/31/2021	06/26/2021	9544899	\$0.00	\$9,630.00
1	06/30/2021	07/13/2021	9475779	\$15,120.00	\$0.00

Payments

Invoice #	Technician	Paid On	Method	Amount	Status	App. for Print #
9475779		07/27/2021	Check	\$15,120.00	Pending	1

Invoices

Invoice #	Invoice Date	Status	Total	Payments	Balance	App. for Print #
9475779	06/17/2021	Pending	\$15,120.00	\$0.00	\$0.00	1
9544899	07/27/2021	Pending	\$9,630.00	\$0.00	\$9,630.00	2

Estimates

Job #	Estimate Sold Date	Sold By	Total	Total Cost
9545891	05/14/2021	Heaven Parlane	\$118,200.00	\$88,700.00
9545897	07/21/2021	Heaven Parlane	\$15,300.00	\$900.00
9545891	07/21/2021	mandiano	\$2,700.00	\$1,900.00

AFTER

Financials

Project Summary [Learn More](#) [View Project Costing](#)

	Amount	Percent Complete
Contract Summary	\$123,230.00	22%
Expenses	\$20,960.00	22%
Cost to Complete	\$72,660.00	Edit
Total Earned	\$27,500.00	22%
Total Retainage	\$2,750.00	2%
Invoiced	\$24,750.00	20.09%
Payments	\$15,120.00	
Totals		-1.91%
AR Balance	\$9,630.00	
Balance to Finish (including Retainage)	\$98,470.00	

Budget vs Actual

Expense Details [Add Invoice](#)

Invoices [Add Invoice](#)

Invoice #	Invoice Date	Status	Total	Payments	Balance	App. for Print #
9475779	06/17/2021	Pending	\$15,120.00	\$0.00	\$0.00	1
9544899	07/27/2021	Pending	\$9,630.00	\$0.00	\$9,630.00	2

Created Payments [Create Payment](#)

Invoice #	Technicians	Paid On	Method	Amount	Status	App. for Print #
9475779		07/27/2021	Check	\$15,120.00	Pending	1

Application for Payment [Add Application for Payment](#)

Application #	Period to Date	Payment Due	Invoice #	Payment	Balance
2	05/31/2021	06/26/2021	9544899	\$0.00	\$9,630.00
1	04/30/2021	07/13/2021	9475779	\$15,120.00	\$0.00

Financials Continued

Let's walk through some of the other notable changes you'll see in the Financials section.

Project Job Costing

First, the Job Costing flyout has been moved to the top of this section and renamed Project Job Costing. Previously, you had to scroll to the bottom of the page, and it was a bit hidden between Purchase Orders and Technicians.

BEFORE

215	Grainger	Hiren Pandya	06/17/2021	Received	\$13,960.00
Subtotal	\$24,750.00	Total	\$24,750.00	Payments	\$15,120.00
Materials	\$0.00	Balance	\$9,630.00	Purchase Orders	\$20,960.00
Job Costing					
Technicians					
Photo	Name	Driving	Working	Total	

AFTER

Financials			View Project Costing	
Project Summary			Amount	Percent Complete
Contract Summary			\$123,220.00	22%
Expenses			\$20,960.00	22%
Cost to Complete			\$72,660.00	Edit

Invoices & Payments

We've made it seamless to add invoices* and create payments* by including each action button at the top of each table. Previously, the only way to add an invoice or payment was to scroll to the top of the page.

Invoices							+ Add Invoice
Invoice #	Invoice Date	Status	Total	Payments	Balance	App. for Pmt #	
9475779	06/17/2021	Pending	\$15,120.00	\$0.00	\$0.00	1	
9544899	07/27/2021	Pending	\$9,630.00	\$0.00	\$9,630.00	2	
Created Payments							Create Payment
Invoice #	Technicians	Paid On	Method	Amount	Status	App. for Pmt #	
9475779		07/27/2021	Check	\$15,120.00	Pending	1	

Application for Payment

For those using Project Tracking, you'll also find it easier to create new payment applications with the button also displayed at the top of the Application for Payment section. Similar to Invoices and Payments, this was only accessible at the very top of the page.

Application for Payment						+ Add Application for Payment
Application #	Period to Date	Payment Due	Invoice #	Payment	Balance	
2	05/31/2021	08/26/2021	9544899	\$0.00	\$9,630.00	
1	04/30/2021	07/17/2021	9475779	\$15,120.00	\$0.00	

*only available for customers on Project Tracking

Jobs & Appointments

The Jobs & Appointments section includes Jobs and Appointments related to the project. While these tables look similar to before, the most significant and most beneficial change you'll see is the ability to Attach Existing Jobs and Book New Jobs right from this section. So again, no more needing to scroll to the top of the page to do this.

BEFORE

Jobs 2

View Calendar

Job #	Type	First Appointment	Last Appointment ↓	# of Appointments	Technicians	Co
9645891	New Construction	12/06/2021	12/06/2021	1		N/A
9645507	New Construction	12/02/2021	12/02/2021	1		N/A

1 - 2 of 2 items

Appointments 2

View Calendar

Job #	Appointment #	Job Type	Start Date & Time	Technicians
9645891	9645891-1	New Construction	12/06/2021 07:00 am	
9645507	9645507-1	New Construction	12/02/2021 07:00 am	

1 - 2 of 2 items

AFTER

Jobs & Appointments

View Calendar

Attach Existing Job

Book New Job

Job #	Type	First Appointment	Last Appointment ↓	# of Appointments	Technicians	Completed On	Status	Total	Tag
9645783	New Construction	12/06/2021	12/06/2021	1		N/A	Scheduled	\$0.00	NEW
9645763	New Construction	12/02/2021	12/02/2021	1		N/A	Scheduled	\$0.00	NEW

1 - 2 of 2 items

Appointments

Job #	Appointment #	Job Type	Start Date & Time	Technicians
9645783	9645783-1	New Construction	12/06/2021 07:00 am	
9645763	9645763-1	New Construction	12/02/2021 07:00 am	

1 - 2 of 2 items

Estimates

Outside of the new look, you'll see three notable changes in the Estimates section:

1. Estimates and Opportunities* are bundled in one section when previously they were separated on the page.
2. You'll see a persistent Build Estimate button*.
3. When you click Build Estimate, you'll be able to either add it to an existing opportunity or create a new opportunity.

BEFORE

Project Opportunities

Add another

Project Opportunity #9473091 (1)

Project Opportunity #9540419 (1)

Project Opportunity #9540931 (1)

Estimates

Job #	Estimate Sold Date	Sold By	Total	Total Cost
	06/14/2021	Jamie	\$119,200.00	\$88,760.00
	07/21/2021	Jamie	\$1,320.00	\$900.00
	07/21/2021	Jamie	\$2,700.00	\$3,960.00

AFTER

Estimates

All Estimates

Build Estimate

ESTIMATE ID	JOB #	NAME	STATUS	SOLD BY	SOLD DATE	TOTAL COST	TOTAL
9473092	-	CapEx Improvements	Sold	Jamie	06/14/2021	\$88,760.00	\$119,200.00
9540420	-	CO1	Sold	Jamie	07/21/2021	\$900.00	\$1,320.00
9540932	-	CO2	Sold	Jamie	07/21/2021	\$3,960.00	\$2,700.00

Opportunities

Build Estimate

Add to Existing Opportunity

Create New Opportunity

Project Opportunity #9473091

Project Opportunity #9540419

Project Opportunity #9540931

Cancel

Next

